



Utah School Funding Study

Conclusions and Policy Recommendations
January 28, 2021



Our Objectives Today

1. Framing the Utah School Funding Study
2. Findings and Recommendations
3. Q & A

A young boy with dark hair, wearing a grey jacket, is sitting at a desk in a classroom. He is holding a pencil in his right hand and looking directly at the camera with a slight smile. The background shows a classroom setting with papers and a red pencil case on the desk. The entire image is overlaid with a semi-transparent blue filter.

Framing the Utah School Funding Study

Project Overview

Putting the Pieces Together

PHASE ONE



PHASE TWO



Project Overview

Principles of Education Funding

Principle 1

Reasonably Equal Educational Opportunity for All



The purpose of this chapter is to provide a minimum school program for the state in accordance with the constitutional mandate. It recognizes that **all children of the state are entitled to reasonably equal educational opportunities regardless of their place of residence in the state and of the economic situation of their respective school districts** or other agencies.



It further recognizes that although the establishment of an educational system is primarily a state function, school districts should be required to participate on a partnership basis in the **payment of a reasonable portion of the cost of a minimum program.**

Principle 2

Local Participation and Determination

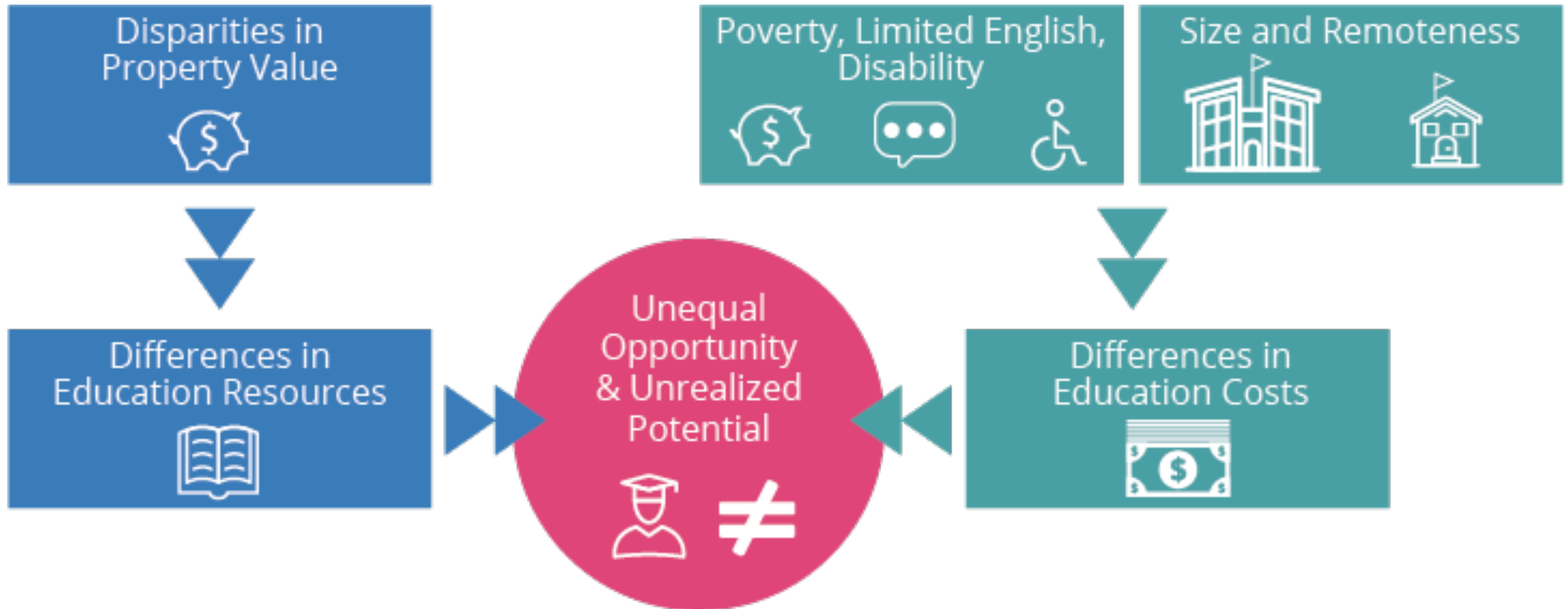


It is also the purpose of this chapter to describe the manner in which the state and the school districts shall pay their respective share of the costs of a minimum program. This chapter also recognizes that **each locality should be empowered to provide educational facilities and opportunities beyond the minimum program** and accordingly provide a method whereby that latitude of action is permitted and encouraged.

Note: Text quoted from Utah Code Annotated § 53F-2-103.

Project Overview

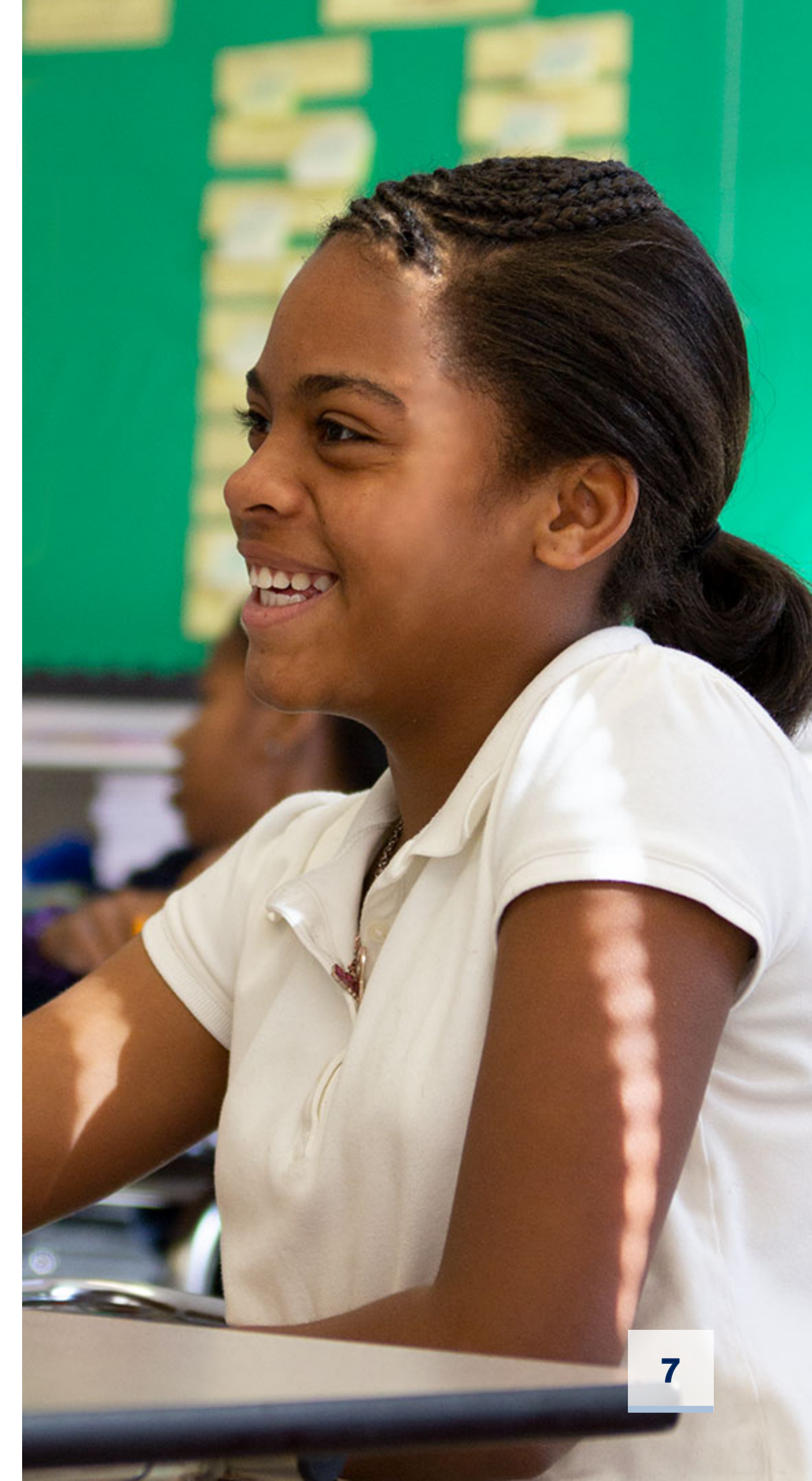
Study Analysis and Methods



Project Review

Overall Conclusions

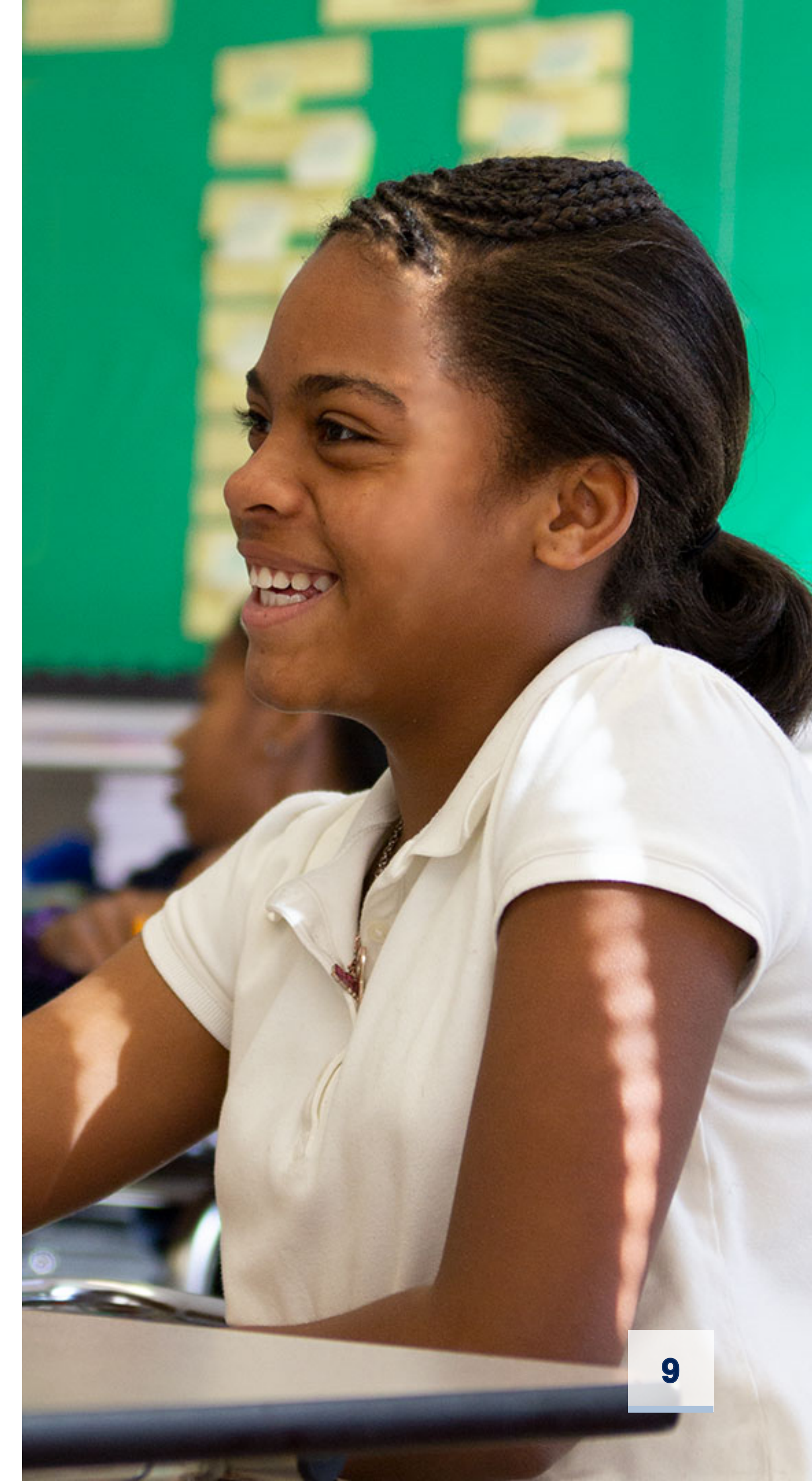
- The fundamentals of Utah's education funding system are strong
- Study findings and recommendations do not point to a need for a comprehensive restructuring of the system
- Opportunities for improvement do exist, and represent a return to the original intent of the Minimum School Program



Findings and Recommendations

Review of Overall Conclusions

- Study findings from both phases of the study inform the final policy recommendations
- Four areas of focus organize the recommendations:
 - **Funding Distribution:** addresses differences in resource needs due on context — especially relates to *ensuring equal opportunity*
 - **Funding Generation:** equalization and balancing state and local contributions — relates to *both principles*
 - **Target Funding:** optimizing state funding system components — *systems-level*
 - **Effective Practices:** draws on engagement with successful schools to highlight effective local practices — especially relates to *local participation and determination*



Funding Distribution

Ensuring Equal Opportunity

Key Findings Informing this Recommendation

- Accounting for other cost factors, spending associated with achieving like outcomes grows as the population of economically disadvantaged students grows (Phase 2 — Finding 15)
- Current programs targeting “at-risk” students provide significantly less additional funding than the study findings suggest is needed (Phase 2 — Finding 20)
- Accounting for other cost factors, spending associated with achieving like outcomes decreases as district enrollment increases (Phase 2 — Finding 13)





Funding Distribution

Consider opportunities to better address additional resource needs driven by differences in local context including especially differences in:

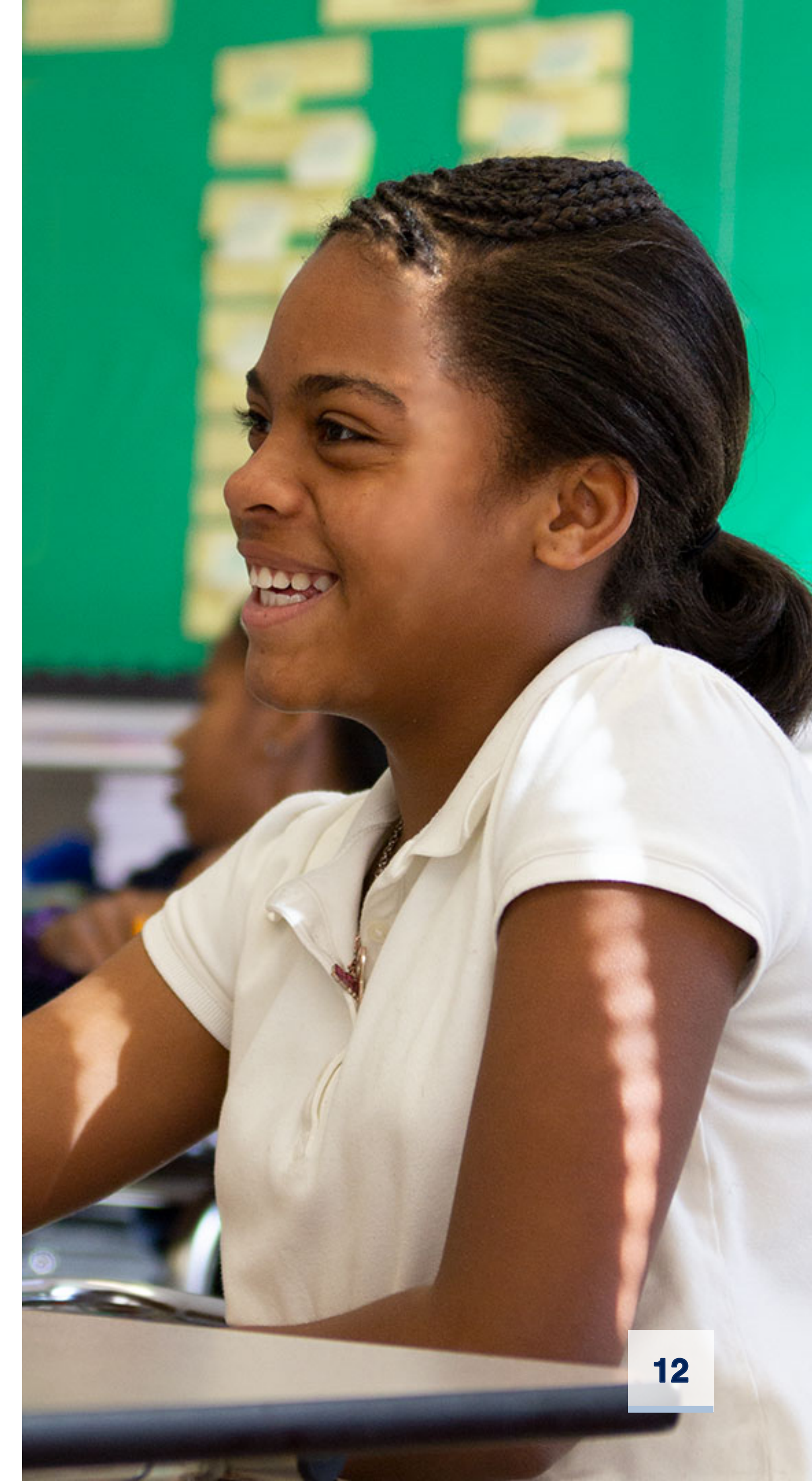
- Student populations
- Scale of operations
- Regional price of labor

Rebalance Local Participation

Reforming the Local Share

Key Findings Informing this Recommendation

- The majority of total excess capacity is highly concentrated in districts with the largest property wealth per pupil (Phase 2 — Finding 2)
- Although equalization policies are in effect, the impacts of these policies on fiscal neutrality are limited (Phase 2 — Finding 3)
- When put in comparable terms, Utah's Basic Property Tax Levy is the second lowest state-required tax rate defining a local share (Phase 2 — Finding 9)





Funding Generation

Consider the Basic Property Tax Levy and equalization policy to:

- Rebalance the local share with consideration to fiscal neutrality and local determination
- Address equalization in tandem with possible new investments

Targeted Funding

Optimize System Components

Key Findings Informing this Recommendation

- Utah stakeholders reported that the vision set by the USBE strategic plan aligns to their own vision for Utah's schools (Phase 1).
- There is general alignment between the expectations of the Minimum School Program, the target outcomes based on the Portrait of a Graduate, and the assignment of funding based on statute *with one significant exception with respect to social-emotional learning* (Phase 1).





Targeted Funding

Consider examining the Related to Basic programs to optimize:

- Coherence
- Stability
- Continuous improvement
- Balance with Basic School Program funds

Supporting Effective Practices

Case Study Reviews of Successful Schools

Key Findings Informing this Recommendation

- **A focus on data use is common among case study schools (Phase 2 — Finding 29)**
- **Case study schools recognize and invest in social-emotional resources to support the “whole child” (Phase 2 — Finding 30)**
- **Case study schools prioritize staff collaboration and embedded professional development opportunities (Phase 2 — Finding 28)**



Supporting Effective Practices

Case Study Reviews of Successful Schools

Key Findings Informing this Recommendation

- **Districts with case study schools provide high levels of autonomy to their schools (Phase 2 — Finding 25)**
- **Culture and the systemic framework for leadership among case study schools is an important feature of their success (Phase 2 — Finding 27)**





Effective Practices

Consider options for the state to build local capacity and/or ability to succeed in three areas:

- Data use
- Social-emotional learning
- Staff collaboration and embedded professional development



Question and Answer



AUGENBLICK,
PALAICH AND
ASSOCIATES



Thank You!

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